AUTHOR NOTE

Note from the Author

T-MINUS is real. My “coverage universe” is how I track a defined space: the players, the signals, the patterns, and the direction of travel. Right now, the inputs are moving quickly, often in several directions at once.

Earlier in my career, that meant tracking roughly 60 to 100 companies. Today, I am applying the same exercise to understand where my own technical aptitude sits relative to peers in this space, not relative to the AI systems themselves. Also, to see who is copying me. JK JK.

> **ATTENTION: Stage 6 in RECEIPTS makes one point clear. The technology is here today.**

As to the Martha Stewart parable, my takeaway is not that there is some literal rule requiring arrest for failing to maximize profit. It is simpler than that. Shareholders expect management to treat value creation with extreme seriousness.

As a former investor-relations superstar delivering multiple Top 5 technology IPOs of the year.

Fun fact: They call the IR team the “smartest people in the room.” As a courtesy to the shareholders, they get the “smartest people in the room.” We do a lot of things in general, but the courtesy is given to the shareholder mostly because: “You know people?...I know people.”

TRUST: The shareholders, I always called them in my head with love — they’re cool and consistently very, very smart — the holders of the “goooold” 💛, care deeply about that line. No question. TRUST/BELIEVE.

“You know the Golden Rule, right?...I know the Golden Rule....Good.”

BOOM ❤️

Thanks for letting me share.